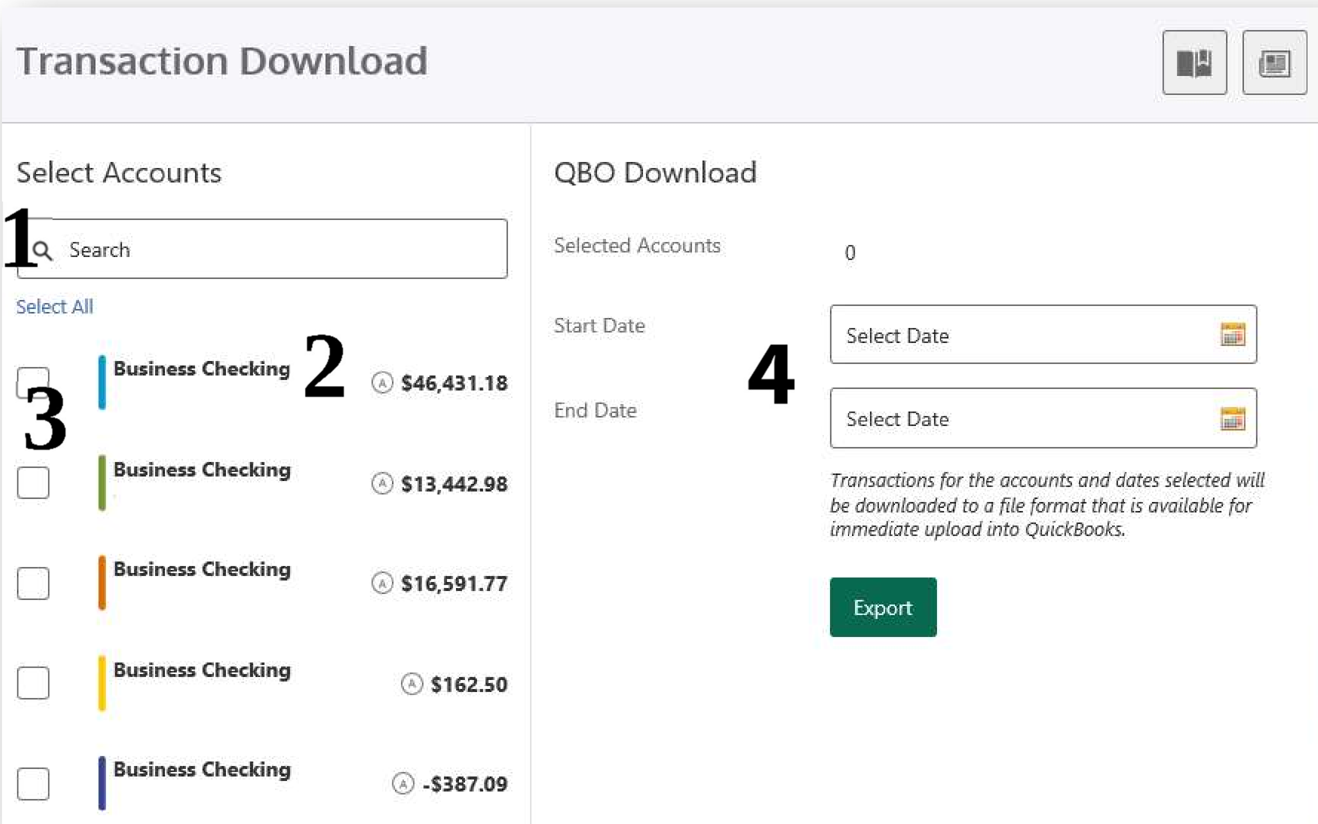
QUICKBOOKS WIDGET – TRANSACTION DOWNLOADS

How do I access and complete the account transaction download?

This widget is automatically available within online banking and works with QuickBooks® The widget will look similar to the below image. (Depending on the theme you choose for your online banking experience, the color of the widget could vary).

- Click on the **Transaction Download** widget, the below screen will appear.



1. Search field to locate a specific account
2. List of accounts
3. How to select the account(s) to download. **(required field)**
   a. Option 1: Click the *Select All* link to mark all accounts
   b. Option 2: Click the check box next to the account(s)
4. Account transaction date range **(required field)**

- Once the account(s) are selected and date range chosen, click **Export**

Note: the next steps may vary slightly depending on the internet browser being used (ie: Internet Explorer, Google Chrome, etc.)

- A pop-up box should appear→click **Save**

- Another pop-up box will appear→click **Open**

- The QuickBooks software will open and you will follow the normal process within QuickBooks to “accept” the download.